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2022



DISRUPTIVE FORCES NECESSITATE BOLD DECISIONS

Disruption has ensued since the dawn of the digital era — but it exploded in intensity and breadth starting in 2020. Meanwhile, customers and employees are demanding more: seamless cross-channel experiences, convenience, reassurance, and commitment to environmental, social, and governance (ESG) values. The list keeps growing, as does the list of harsh realities that challenge progress: the pandemic, supply chain disruptions, and the “Great Resignation.” As a result, the need to act quickly and intelligently in the moment has never been so critical.

In 2022, business leaders will invest in technology and refocus business strategies. AI adoption and tech spending will accelerate. Tech companies will jump into adjacent markets, equally capitalizing on opportunity and sowing confusion. Greenwashing will wash away as sustainability becomes a must-have.

2022 is a year to be bold. The old ways of working no longer work. The future is up for grabs. Leading firms will use the crucibles of 2020 and 2021 to forge a path to an agile, creative, and resilient tomorrow.



2021
2022

Consumers see the world as all digital.

Around **80%** of consumers will see the world as all digital, with no divide.

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Consumers have rapidly increased their technology adoption and usage since the outbreak of the COVID-19 pandemic. In April 2020, 49% of UK and 63% of US online adults said they had done a [new online activity](#), such as attending a religious service or exercise class online. Thirty-five percent of UK and 44% of US online adults upgraded their in-home technology. Even consumers who were once considered digital holdouts anticipate continuing the online behaviors they picked up in the pandemic.

As a result, consumers have higher expectations that digital experiences work well. Although they're generally willing to forgive companies struggling with pandemic-related disruptions, consumers also expect companies to double down on building a successful and sustainable digital customer experience.

Fifty-six percent of US consumers believe that companies should have figured out how to handle pandemic-related disruption by now. Fifty-eight percent of consumers expect companies to have marshalled their digital resources so they'll be able to respond better if the country is plunged into another public health emergency.

Tech execs leap from digital to human-centered technology transformations.

10% of technology executives will prioritize investments to radically expand creativity and innovation.

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So-called “digital transformation” efforts have come and gone. In 2021, [only 21% of global purchase influencers](#) said their firms nominated digital transformation as a key action to address business model change. That number will drop to less than 15% in 2022. But that doesn’t mean pandemic-sparked technology acceleration will slow.

Ongoing [digital sameness](#) and [falling returns on IT investments](#) are forcing firms to seek new means to demonstrate business value in crowded markets. Leading firms will unlock the creativity of their employees and surround them with intelligent technologies such as automation and predictions engines that focus on outcomes, not just financial results.

This shift will establish a new era of transformation comprising human-centered technology initiatives that form a tight link between customer experience (CX) and employee experience (EX), drive competitive advantage, and deliver a 3% to 5% net gain in productivity. In 2022, 10% of technology executives will prioritize investments in strategic partnerships and innovation practices at three times the rate of their competitors to radically expand their organization’s creative and innovative capacity.

Brands dance and spar with marketplaces.

Global spending on order management software will grow to over **\$1 billion** in 2022, on its way to **\$1.5 billion** in 2024.

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In the US, 57% of B2C e-commerce sales flow through marketplaces today. In China, it's 98%. But marketplaces are as much enemy as friend — amping up sales volume at the expense of stealing a brand's soul. So, in 2022, brands will fight back with every technology and weapon in the arsenal.

Brands will make direct relationships and better shopping experiences a priority to keep customers away from marketplaces and coming back for more. The mantra will become “commerce anywhere” as first movers and fast followers alike pursue presence in every possible shopping moment, from an owned website to an influenced marketplace or social slot to a paid retail media placement.

They will invest in the commerce building blocks of their experience architectures; order management, payments, and inventory control will make every touch a shoppable moment; investments in immersive experiences will turn browsing into virtual inhabiting; and subscription billing will make loyalty a business model pivot.

Third-party risks escalate as just-in- case supply chains gain ground.

In 2022, **60%** of
security incidents will
involve third parties.

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In 2020, 27.8% of organizations reported [20 or more supply chain disruptions](#), which is a magnitudinal increase from 4.8% in 2019, according to the Business Continuity Institute. Firms are looking to make supply chains more resilient without dulling their competitive edge — transitioning from just-in-time (JIT) efficiency to the just-in-case (JIC) contingency necessary to ward off disruption and volatility. At the same time, firms are accelerating innovation.

The collision of these two priorities means that firms are effectively doubling the size of their third-party ecosystem. And more third parties means more third-party security problems. Forrester data reveals that 55% of security pros reported their organization experienced an incident or breach involving supply chain or third-party providers in the past 12 months.

With cyberattacks continuing to target smaller vendors and suppliers, SolarWinds-style headlines will plague organizations that don't invest in the risk management trifecta: people, process, and technology. Smart companies will ensure the tech stack (not a single tool or Excel) includes risk assessment, supply chain mapping, real-time risk intelligence, and business continuity management.

Creative AI becomes a focus for innovators.

Creative AI systems will win **dozens** of patents in 2022.

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Creativity was once thought to be the sole provenance of humans, but in 2021, [South Africa granted the first patent to a creative AI system](#). While the US and EU rejected the same patent application on the grounds that only humans can receive patents, this seminal step toward the legal recognition and protection of products will encourage further innovation in creative AI. The last two years gave AI adoption the impetus it needed to become even more essential and critical for the future. Enterprises need speed and creativity to make AI work effectively.

As a result, 2022 will see dozens of patents granted to creative machines. Of course, AI will not “own” the products in the traditional sense — the developers of the AI systems, such as Stephen Thaler, the programmer who created the now-patented DABUS, will still enjoy commercial benefits. But companies will experiment with creative AI, knowing that these innovations may be legally protected.

B2B marketers accelerate technology investments, with uneven results.

75% of personalized
engagement strategies
will not meet ROI goals.

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Persistent digital engagement will become the norm, with 70% of marketers adopting an “always on” digital engagement strategy in 2022. The stakes are high — 17% of B2B buyers said that the competence demonstrated during the buying process was the most significant driver of purchase choice, far ahead of the relationship with the sales rep (5%) or customer references (6%).

To meet their always-on goals, marketing leaders will turn to “smarter” (more autonomous and automated) solutions with complex tech stacks. Martech’s slice of the marketing budget, which has dropped to 19%, will increase to 25% in 2022.

But 75% of efforts to create automated, personalized engagement won’t meet ROI goals because of inadequate buyer insight. In 2022, only 10% of B2B organizations will identify metrics to measure the value created for buyers during the buying process. B2B marketing leaders need to instill customer centricity into planning and execution processes to meet personalization goals.

Brands take bold actions to advance ESG goals.

10 big brands will step in where governments fail to act.

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2 022 will see less performative virtue signaling within the private sector. Instead, B2C marketers will take bold actions that advance ESG goals. Forrester's March 2021 [Global Trust Imperative Survey](#) found that consumers in the US, the UK, France, and India trust companies more than governments — and they increasingly expect brands to use their platforms to [lead the change on issues impacting greater society](#).

Leading brands are already responding. In 2021, several mainstream companies took public action on politicized issues, including when:

- MLB [moved its All-Star Game](#) after Georgia passed the Election Integrity Act.
- TJX joined many other corporations [requiring employees to be fully vaccinated](#).
- Airbnb offered [free housing to Afghan refugees](#).

The [Forrester Analytics Consumer Technographics® Benchmark Survey, 2021](#), shows that year over year, more adults in the US, Canada, the UK, Germany, Spain, and Italy regularly purchase from brands that align with their personal values. The highest jump occurred in the US, with a rise from 40% in 2020 to 48% in 2021. This number will surpass 50% in 2022 — spurring brands to take actions like never before.

In 2022, CMOs must navigate an even more politically divided and vocal consumer base — which will be intensified in the US by the midterm elections in November 2022 — by ensuring company values and brand strategy are inextricably coupled.

Accessibility becomes a major business priority.

In 2022, **\$10 billion** in design spending will shift to vendors and services that commit to accessibility.

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Thirty-six percent of respondents to Forrester’s Q4 2020 Global State Of Design Teams Survey already have a top-down commitment, and the number of job listings with “accessibility” in the title [grew 78% from July 2020 to July 2021](#) — evidence that firms are following through on those promises. CX teams will hone their focus to make a targeted impact in areas such as accessibility and privacy, ratcheting up their investments in these areas.

As accessibility turns into a must-have, technology vendors and services firms will need to shore up expertise in accessibility or lose out on \$10 billion in spending in the US and Canada alone. Why? A commitment to accessibility requires that procured technologies and services are also accessible.

More organizations buying tech will commit to accessibility in 2022, due to pressure created by the increasing number of [digital accessibility lawsuits](#) and the increasing number of firms creating diversity and inclusion programs ([26% did for the first time in 2021](#)). Tech vendors and services firms will need to follow suit and make similar commitments if they want a piece of the \$10 billion pie.

Companies fail at anywhere work, and it isn't the virus's fault.

One-third
of first attempts at
anywhere work
simply won't work.

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Ten percent of companies will commit to a fully remote future. For the remaining 90%, vaccine mandates will lead to complications but won't be the cause of most return-to-office failures. The real pain will be felt at the 60% of companies shifting to a hybrid model: One-third of first attempts at anywhere work simply won't work.

Leaders will claim support for a hybrid model but still design meetings, job roles, and promotion opportunities around face-to-face experiences. When it's clear that productivity is suffering, these same execs will blame hybrid work rather than looking in the mirror at the real culprit.

A smaller number of failures will come from the 30% of companies that insist on a fully in-office model, only to find that employees simply won't have it. Attrition at these firms will rise above their industry averages — monthly quit rates will rise to as high as 2.5% for as much of 2022 as needed until executives feel the pain and finally commit to making hybrid work ... work.

Cloud-native takes center stage in enterprise cloud.

Container adoption will hit **50%** in 2022.

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The scale mandate will reform as companies experience new levels of cloud scale in light of the pandemic-fueled digital acceleration. Cloud-native adoption rose between 2020 and 2021: Developers reported increased usage of containers (33% to 42%) and serverless (26% to 32%) at their organization.

In 2022, cloud-native adoption will rise to half of enterprise organizations. More importantly, enterprises will refactor/replatform their cloud strategies to be based on cloud-native, rather than layering cloud-native onto their existing plans.

Cloud-native technologies will transcend all major technology domains, including:

- Big data (distributed database, data lake, and Spark).
- AI (Kubeflow for ModelOps, Ray on K8s for distributed machine learning/reinforcement learning).
- Internet of things (EdgeX 2.0 refactoring toward microservices).

Rather than being supplementary or a nice-to-have, cloud-native will become the core of the cloud strategy in 2022 and moving forward.

Bias bounties become bountiful.



At least **5** large companies will introduce bias bounties in 2022.



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Bias bounties are modeled on bug bounties, which reward users who detect problems in security software. In the case of bias bounties, users are rewarded for identifying bias in AI systems. This year, Twitter launched the first major bias bounty and [awarded \\$3,500 to a student](#) who proved that its image cropping algorithm favors lighter, slimmer, and younger faces. In 2022, other major tech companies such as Google and Microsoft will implement bias bounties, as will non-technology companies including banks and healthcare companies.

AI professionals should consider using bias bounties as a canary in the coal mine for when incomplete data or existing inequity may lead to discriminatory outcomes from AI systems. With trust high on the agenda of stakeholders, organizations will have to drive decision-making based on levers of trust such as accountability and integrity, making bias elimination ever more critical.

Smart infrastructure growth accelerates.

In 2022, investment in smart infrastructure will increase **40%**.

FORRESTER

Infrastructure investment is an effective way to stimulate GDP. The US, the EU, and China launched related initiatives backed by trillions of dollars of stimulus. IoT and edge technologies that ride advanced networks like 5G have demonstrated that they can empower smart, connected ports, roads, and trains. It's a strong match, and in 2022, we expect smart infrastructure investments to gain remarkable growth powered by this government spending windfall in all geographies.

To facilitate pandemic recovery, city planners will prioritize initiatives to provide citizens with internet connectivity, address public health, and manage critical resources (e.g., water, power, lighting) using smart meters and predictive grid monitoring.

Stakeholders will also harness insight captured from edge devices and IoT-enabled infrastructure to modify traffic patterns to reduce congestion, evaluate multimedia data to deliver insight for security applications, and/or combine 5G, vehicle-to-everything (V2X), and edge technologies to enable autonomous vehicles (e.g., container trucks, automated guided vehicles) in ports and airports.

In a time of crisis, every decision counts.

In 2022, the new normal will be more new than it will be normal. Creativity, resilience, and agility fueled by strong customer understanding and smart tech investment will separate leaders and laggards, no matter the industry.

Forrester's predictions illuminate where pressure and opportunity will arise in 2022, but it's not enough to understand what's coming. You need to swiftly tackle your most pressing priorities. With Forrester Decisions — a portfolio of research services for leaders across technology, customer experience, marketing, sales, and product management — you'll be able to shorten the distance between a bold vision and superior business impact.

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